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N° 28, November 2001

Ontario's U.S. Travel Markets - 2000

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Ontario

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HIGHLIGHTS

U.S. Travel to Ontario – 2000

- In 2000, 29.088 million visitors from the U.S. came to Ontario. Of these visitors, 7.564 million stayed in Ontario for one or more nights. This level of visitation accounted for 67% of Canada's total U.S. visitors and for 50% of the country's overnight U.S. visitors in 2000.

- U.S. visitors spent $4,319 million in the province and an additional $804 million on Canadian carrier fares in order to get here, for a total of $5,124 million of U.S. residents' spending in 2000. Ontario represents half of all spending by U.S. visitors in Canada ($5,124 million out of $10,422 million).[1]

- Put within the context of Ontario's balance of payments on the Tourism Account, in 2000 Ontarians spent $5,044 million in the U.S. and a further $928 million on U.S. fares to get to their destinations. When combined with the $5,124 million in receipts, these spending levels yield a deficit of $848 million with the U.S. In other words, Ontarians spent $848 million more in the U.S. than the residents of the U.S. spent in Ontario (fares are included).

- U.S. visitors on a same day visit to Ontario spent a total of $1,698 million, whereas those who stayed in Ontario for one or more nights spent $3,426 million, or $453.00 per person visit. The overall average (any length of stay) was $176.00 per person visit.[2]

- Michigan and New York generated the largest share of total visitation to the province (42% and 30%, respectively), followed by Ohio (5%), Pennsylvania (3%) and Minnesota (3%). These states also generated most of the overnight U.S. travel in Ontario led by Michigan (1.693 million or 22%), New York (1.389 million or 18%) and Ohio (684,000 or 9%).

- Most U.S. residents who visited Ontario came to Canada in private automobiles (86%), although some came on a commercial flight (7%) or other public carrier such as a train, bus or boat (5%).[3]

- U.S. visitors continue to concentrate their visits to Ontario in the third calendar quarter (35%), followed by spring (26%), fall (21%) and winter (18%). An even higher concentration of travel in the third calendar quarter is evident for overnight visitors to the province (42%).[4]

- More U.S. residents who visited Ontario during 2000 were on pleasure trips (50%) than travelled for any other single reason. Visitors who took their trips for the purpose of visiting friends or relatives accounted for 14% of Ontario's U.S. visitors, while business travellers accounted for 8%. Among U.S. overnight visitors to Ontario in 2000, pleasure trips were also the most common (56%) but business travel (17%) was as prominent as trips to visit friends and relatives (17%).[5]

- The average length of stay among all U.S. visitors was less than one night (0.86). Overnight visitors had an average length of stay in Ontario of 3.3 nights.

- Overnight U.S. visitors who visited Ontario during the first calendar quarter had the shortest average stay in the province (2.5 nights), while those who visited the province during the third quarter had the longest (3.7 nights).

- The average U.S. visitor to Ontario travelled in groups of 2.0 persons, most of which were comprised by adults only (90% of the U.S. visitors to Ontario travelled in adults-only groups). The typical U.S. visitor in the province was 45 years old.

- Most of the 25.0 million person nights in the province by U.S. visitors were spent in roofed commercial accommodation (54% or 13.5 million person nights). Hotels were especially popular, accounting for 3-in-10 person nights or 7.3 million. Motels (2.4 million person nights) and commercial cottages or cabins (3.8 million person nights) were also widely used by U.S. visitors in 2000.

- Approximately one-fifth of the nights spent by these visitors in 2000 were in private homes (5.1 million person nights). A further 1.7 million were spent in private cottages and 1.4 million were spent in campgrounds or trailer parks in the province.

- Shopping was the most popular activity engaged in by overnight U.S. visitors to Ontario (56%), followed by sightseeing (49%), dining at high quality restaurants (39%), visiting friends or relatives (31%), participating in sports or outdoor activities (29%) and visiting national, provincial, regional parks or historical sites (27%).

- At least half of the U.S. overnight visitors from most major feeder regions claim that value for money in Canada is "better than" the value they would obtain in the U.S.A.

- The vast majority of same day person-visits from the U.S. to Ontario took place in Southwestern Ontario (49% or 10.6 million) and Festival Country (34% or 7.3 million). These two regions are major land ports between Canada and the U.S. They also have major gaming attractions that have had considerable appeal to the U.S. cross-border market.

- Metro Toronto (30% or 2.3 million visits), Festival Country (27% or 2.1 million visits) and Southwestern Ontario (17% or 1.3 million visits) were the most popular regions for overnight travel.

-

Comparison of Key Findings: 1994 through 2000

- Total visitation to Ontario from the U.S. declined between 1999 and 2000 by 3%. Despite this recent decline, the 29.088 million U.S. visitors in the province in 2000 represent a twenty-four percent increase over 1994 (23.482 million).

- Over the past year declines in U.S. visitors to Ontario are most evident for Wisconsin (-20%) and Illinois (-15%), followed by Ohio (-8%).

- At $5,124 million, total spending by U.S. visitors in Ontario in 2000 increased by 4% over 1999, primarily as a result of substantial increases in air carrier accruals to the province. These fares increased by 18% between 1999 and 2000.

- When inflationary impacts are removed, real expenditures in Ontario by U.S. visitors (measured in 1992 dollars) decreased by –0.6% from $4,093 million in 1999 to

$4,968 in 2000. Compared to 1994, real U.S. expenditures in Ontario increased in 2000 by 49.1%.

- Average expenditures per person visit increased, in constant 1992 dollars, in 2000 by 2.9% over 1999 and by 20.7% over 1994.

- The ways in which U.S. visitors spend their money in Ontario has not changed appreciably over time.

- The current inbound U.S. market is somewhat more likely to spend nights in the province now (74%) than was the case in 1994 (71%) but the length of stay among overnight U.S. visitors has remained constant at just over three nights.

- "Pleasure" continues to be the dominant trip purpose among U.S. visitors (50%). This motivation has remained constant over the past six years. Business travel and trips to see friends and relatives have also remained stable over the past few years.

- Hotels continue to be the most popular form of lodging among U.S. visitors in Ontario. Two-fifths of these overnight visitors spend at least one night in a hotel during their stay in the province.

- Ontario's U.S. overnight visitors have maintained a consistent activity pattern over the years. In 2000, they were as likely to engage in shopping, sightseeing, visiting a park or historic site, going to a museum, zoo or natural display, and/or dining at a high quality restaurant while travelling in Canada as they were in previous years.

- There are no differences in the region-to-region pattern of U.S. travel within the province over the past year. Southwestern Ontario attracted 4-in-10 U.S. visitors' stops in 1999 and continues to attract this level in 2000 (41%). Similarly, just over 3-in-10 U.S. visitors stopped for a night or took a day excursion to Festival Country in 1999 and in 2000. About 1-in-12 U.S. visitors stopped in Ontario East in each of these years (7% in 2000).

POINTS SAILLANTS

Voyageurs américains en Ontario – 2000

- En l'an 2000, 29,088 millions de visiteurs américains se sont rendus en Ontario. Sur ce nombre, 7,564 millions ont séjourné dans la province pendant au moins une nuit. Ces visites ont représenté 67 % du nombre total de visiteurs américains au Canada et 50 % du nombre de visiteurs américains ayant passé une nuit au Canada, en l'an 2000.

- Les visiteurs américains ont dépensé 4 319 millions de dollars dans la province et 804 millions de dollars de plus en billets d'avion sur des transporteurs canadiens, soit au total 5 124 millions de dollars en dépenses de la part des résidentes et résidents des États-Unis, en l'an 2000. La moitié des dépenses des visiteurs américains au Canada sont revenues à l'Ontario (5 124 millions de dollars sur un total de 10 422 millions de dollars).[6]

- Si l'on compare ces chiffres à la balance des paiements de la province au titre du compte du tourisme, en l'an 2000, les Ontariennes et Ontariens ont dépensé le montant de 5 044 millions de dollars aux États-Unis et de 928 millions de dollars de plus en billets d'avion sur des transporteurs américains, pour se rendre à leur destination. Combinées aux recettes de 5 124 millions de dollars, ces dépenses représentent un déficit de 848 millions de dollars avec les États-Unis. En d'autres termes, les Ontariennes et Ontariens ont dépensé 848 millions de dollars de plus aux États-Unis que les résidentes et résidents des États-Unis n'ont dépensé en Ontario (billets d'avion inclus).

- Les visiteurs américains qui se sont rendus en Ontario pendant une journée ont dépensé au total 1 698 million de dollars alors que ceux qui ont séjourné dans la province pendant au moins une nuit ont dépensé 3 426 millions de dollars, ou 453 $ par visite et par personne. La moyenne globale (n'importe quelle durée de séjour) était de 176 $ par personne et par visite.[7]

- Les états du Michigan et de New York ont été responsables du plus grand nombre de visites totales dans la province (42 % et 30 % respectivement), suivis de l'Ohio (5 %), de la Pennsylvanie (3 %) et du Minnesota (3 %). Ces états sont responsables du plus grand nombre de visiteurs américains ayant séjourné pendant plus de 24 heures en Ontario. Venait en tête le Michigan (1,693 million de personnes ou 22 %), suivi de l'état de New York (1,389 million ou 18 %) et de l'Ohio (684 000 personnes ou 9 %).

- La plupart des résidentes et résidents américains qui sont venus visiter la province sont venus en automobile (86 %), bien que certains soient venus en avion (7 %) ou en train, autobus ou bateau (5 %).[8]

- Les visiteurs américains continuent de concentrer leurs visites en Ontario au cours du troisième trimestre de l'année civile (35 %), cette saison étant suivie du printemps (26 %), de l'automne (21 %) et de l'hiver (18 %). On constate un nombre supérieur de visiteurs séjournant plus de 24 heures en Ontario, au cours du troisième trimestre de l'année civile (42 %). [9]

- La plupart des visiteurs américains qui sont venus en Ontario en l'an 2000 ont fait un voyage d'agrément (50 %). Ceux qui sont venus rendre visite à des amis ou parents représentaient 14 % du nombre de visites et ceux qui venaient pour affaires en représentaient 8 %. Parmi les personnes faisant un séjour en Ontario de plus de 24 heures, en l'an 2000, les voyages d'agrément étaient également les plus nombreux (56 %), suivis des voyages d'affaires (17 %) et des visites rendues à des amis ou à de la parenté (17 %).

- La durée moyenne du séjour de tous les visiteurs américains était inférieure à une nuit (0,86). La durée moyenne du séjour des visiteurs faisant un voyage de plus de 24 heures était de 3,3 nuits.

- Les visiteurs américains qui se sont rendus en Ontario au cours du premier trimestre de l'année civile ont enregistré la durée de séjour moyenne la plus courte dans la province (2,5 nuits), alors que ceux qui ont visité la province au cours du troisième trimestre ont enregistré la durée de séjour la plus longue (3,7 nuits).

- Les visiteurs américains en Ontario ont en général voyagé en groupes de 2 personnes, composés, généralement, uniquement d'adultes (90 % des visiteurs américains en Ontario ont voyagé uniquement avec des groupes d'adultes). Le visiteur américain typique était âgé de 45 ans.

- La plupart des 25 millions de nuits-personnes passées dans la province par des visiteurs américains l'ont été dans des établissements commerciaux (54 % ou 13,5 millions de nuits-personnes). Les hôtels étaient spécialement populaires, représentant 3 nuits-personnes sur 10 ou 7,3 millions de nuits. Les motels (2,4 millions de nuits-personnes) et les chalets commerciaux ou cabines (3,8 millions de nuits-personnes) ont également étaient utilisés comme lieux de séjour.

- Environ un cinquième des nuits passées par ces visiteurs en l'an 2000 l'ont été dans des foyers privés (5,1 millions de nuits-personnes). Par ailleurs, 1,7 million de nuits-personnes ont été passées dans des chalets privés et 1,4 million dans des terrains de camping ou de caravanes de la province.

- Le magasinage était l'activité la plus populaire des visiteurs américains ayant passé plus de 24 heures en Ontario (56 %), suivi des visites touristiques (49 %), des repas dans de grands restaurants (39 %), de la visite de parents ou d'amis (31 %), de la participation à des activités sportives et de plein air (29 %) et de la visite de parcs nationaux, provinciaux et régionaux et de sites historiques (27 %).

- Au moins la moitié des visiteurs américains ayant passé plus de 24 heures en Ontario provenant des principales régions d'origine estiment qu'ils en ont eu plus pour leur argent au Canada qu'aux États-Unis.

- La vaste majorité des visites-personnes d'une seule journée l'ont été dans le Sud-Ouest de l'Ontario (49 % ou 10,6 millions) et dans la région des festivals (34 % ou 7,3 millions). Ces deux régions sont les principaux points d'accueil entre le Canada et les États-Unis. Elles comprennent également des attractions majeures au plan du jeu qui attirent de nombreux visiteurs de l'autre côté de la frontière.

- Le grand Toronto (30 % ou 2,3 millions de visites), la région des festivals (27 % ou 2,1 millions de visites) et le Sud-Ouest de l'Ontario (17 % ou 1,3 million de visites) étaient les régions les plus populaires pour les séjours de plus de 24 heures.

Comparaison des résultats clés : de 1994 à l'an 2000

- Le nombre total de visites en Ontario en provenance des États-Unis a diminué entre 1999 et l'an 2000 de 3 %. En dépit de ce récent déclin, les quelque 29,088 millions de visiteurs américains qui se sont rendus dans la province en l'an 2000 représentent une augmentation de vingt-quatre pour cent par rapport à 1994 (23,482 millions).

- Au cours de l'année passée, la baisse du nombre de visiteurs en Ontario a été la plus manifeste dans le Wisconsin (-20 %), dans l'Illinois (-15 %) et dans l'Ohio (-8 %).

- Les dépenses totales des visiteurs américains en Ontario, en l'an 2000, soit 5 124 millions de dollars, ont augmenté de 4 % par rapport à 1999, principalement en raison de l'augmentation notable des tarifs des compagnies aériennes et des retombées pour l'Ontario. Ces tarifs ont augmenté de 18 % entre 1999 et l'an 2000.

- Une fois l'impact inflationniste éliminé, les dépenses réelles en Ontario des visiteurs américains (estimées en dollars de 1992) ont diminué de -0,6 %, passant de 4 093 millions de dollars en 1999 à 4 068 millions de dollars en l'an 2000. Par rapport à 1994, les dépenses américaines réelles en Ontario ont augmenté en l'an 2000 de 49,1 %.

- Les dépenses moyennes par visite-personne ont augmenté, en dollars constants de 1992, de 2,9 % en l'an 2000, par rapport à 1999, et de 20,7 % par rapport à 1994.

- La façon dont les visiteurs américains dépensent leur argent en Ontario n'a pas vraiment changé au fil du temps.

- Les visiteurs actuels en provenance des États-Unis sont plus enclins à passer quelques nuits dans la province (74 %) que ce n'était le cas en 1994 (71 %). Cependant, la durée du séjour des visiteurs américains faisant un séjour de plus de 24 heures est restée constante, soit un peu plus de trois nuits.

- Les voyages d'agrément continuent d'être la principale raison des visites des touristes américains (50 %), comme c'est le cas depuis les six dernières années. Les voyages d'affaires et les visites rendues à des amis ou à de la parenté ont également été caractérisées par une stabilité au cours des dernières années.

- Les hôtels continuent d'être le type d'hébergement le plus populaire parmi les visiteurs américains qui se rendent en Ontario. Deux cinquièmes des visiteurs qui font un séjour de plus de 24 heures passent au moins une nuit dans un hôtel pendant leur séjour dans la province.

- Les visiteurs américains qui font un séjour de plus de 24 heures ont maintenu des tendances constantes en matière d'activités au fil du temps. En l'an 2000, voici les activités principales : magasinage, visite touristique, visite d'un parc ou d'un site historique, visite d'un musée, d'un zoo ou d'une exposition naturelle ou dîner dans un grand restaurant. Cette tendance n'a pas changé par rapport aux années précédentes.

- On a constaté certaines différences en matière de visites par les touristes américains en fonction des régions, au cours de l'année écoulée. Le Sud-Ouest de l'Ontario a attiré 4 visiteurs américains sur 10 en 1999 et continue d'attirer le même nombre de

visiteurs en l'an 2000 (41 %). Par ailleurs, un peu plus de 3 visiteurs américains sur 10 ont passé une nuit ou ont fait une excursion d'un jour dans la région des festivals en 1999 et en l'an 2000. Environ 1 visiteur américain sur 12 s'est arrêté dans l'Est de l'Ontario au cours de chacune de ces années (7 % en l'an 2000).

INTRODUCTION

The information contained in this report was extracted from the micro data files of the International Travel Survey (ITS) by Research Resolutions & Consulting Ltd. on behalf of the Ontario Ministry of Tourism, Culture and Recreation.

The ITS is conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities which essentially conducts a census of border crossings and distributes the questionnaires to a sample of individual travellers. The questionnaires are self-completed by the travellers and are mailed back to Statistics Canada.

The provincial statistics presented in this report are based on the census of U.S. visitors as far as their numbers, their origin and their mode of transport used to enter Canada are concerned. Most of the remaining trip characteristics were obtained from 20,506 completed questionnaires by U.S. visitors (out of 37,706 usable questionnaires of U.S. visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit used.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

The regional data contained in this report differ from the data contained in pre-1998 ministry-publications because same day excursions by overnight visitors to Ontario were not included in the database prior to 1998. The reader is referred to the 1999 report and tabulations for a comparison of Ontario level data with and without same-day excursions by overnight visitors.

For more details on how Ontario manages this database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of terms used throughout this report is appended. For more information on this publication please contact:

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AN OVERVIEW OF ONTARIO'S U.S. VISITORS - 2000

Ontario's Share of U.S. Visits to Canada During 2000, 43.558 million U.S. residents visited Canada (excluding commuters and students) and of these, 15.147 million stayed for one or more nights. Ontario accounted for 67% of the total U.S. visitors to Canada (or 29.088 million) and 50% of the overnight visitors (or 7.564 million).[10]

Of the 29.088 million U.S. visitors to Ontario, 28.173 million visited only Ontario and the remainder of 915,000 visited Ontario and some other Canadian province.[11]

Port of Entry into Canada Windsor and the Niagara region processed the majority of the 29.119 million[12] Americans who entered Canada through Ontario's international ports (Windsor: 35%; Niagara/Fort Erie: 37%), followed by Sarnia (9%) and Toronto's airports (6%).[13]

Transportation Used Most U.S. residents who visited Ontario came to Canada in private automobiles (86%), although some came on a commercial flight (7%) or other public carrier such as a train, bus or boat (5%).[14]

While in Canada, most U.S. visitors to Ontario relied on their private automobiles for inter-city travel (85%), followed by commercial bus (5%) or a rented vehicle (4%).

Same Day vs. Overnight Of the 29.088 million U.S. visitors to the province, 74% (or 21.524 million) stayed for one day or less and 26% (or 7.564 million) stayed for one or more nights.

Origin Michigan and New York generated the largest share of total visitation to the province (42% and 30%, respectively), followed by Ohio (5%), Pennsylvania (3%) and Minnesota (3%). These states also generated most of the overnight U.S. travel in Ontario led by Michigan (22% or 1.693 million), New York (1.389 million or 18%) and Ohio (684,000 or 9%).[15]

The seven U.S. states bordering Ontario or the Great Lakes generated 86% of all U.S. visits to the province and 68% of overnight visits. California was the largest source of U.S. travel to Ontario outside Ontario's border states (accounting for 1% of the total visits and 4% of the overnight visits).[16]

Repeat Visitors Most overnight U.S. visitors to Ontario indicate that they have been to Canada on an overnight trip in the past (91%). The average number of overnight trips among those who had visited Canada during the past five years was 22, or approximately 4 trips per year. Overnight visitors from New York (39 trips) and Michigan (38 trips) are especially frequent overnight travellers to Canada.[17]

Seasonality U.S. visitors continue to concentrate their visits to Ontario in the third calendar quarter (35%), followed by spring (26%), fall (21%) and winter (18%). An even higher concentration of travel in the third calendar quarter is evident for overnight visitors to the province (42%).[18]

There is comparative consistency in seasonal patterns for Ontario's major U.S. markets, although overnight visitors from Illinois (51%) and Wisconsin (48%) had a higher incidence of travel in the summer months than their counterparts from New York (42%), Michigan (40%) or Pennsylvania (39%).

Overnight trips motivated by "pleasure" are most highly concentrated in the third calendar quarter (51%), followed by the spring quarter (26%). The fourth quarter attracts less than one-tenth of Ontario's U.S. overnight pleasure visitors (9%).

The third calendar quarter is also very popular among tourists coming to Canada to see friends and relatives (36%), followed by the spring quarter (26%) and a comparatively robust fourth quarter. One-quarter of U.S. overnight visitors in Ontario on "VFR" trips are in Canada during the fourth quarter, likely coincident with major winter holidays and religious festivals.

Overnight U.S. business travel in Ontario is somewhat less concentrated in any one season than is pleasure or VFR travel. Trips motivated by business commence in each of the spring (29%), summer (28%) and fall quarters (24%) at about equal rates, with the remaining one-fifth taking place in the winter quarter (20%).[19]

Main Purpose of Trip More U.S. residents who visited Ontario during 2000 were on pleasure trips (50%) than travelled for any other single reason. Visitors who took their trips for the purpose of visiting friends or relatives accounted for 14% of Ontario's U.S. visitors, while business travellers accounted for 8%. Among U.S. overnight visitors to Ontario in 2000, pleasure trips were also the most common (56%) but business travel (17%) was as prominent as trips to visit friends and relatives (17%).[20]

CHART 1: The Top Overnight U.S. Travel Markets by Main Purpose and Origin

Pleasure (total=4.2 million overnight visits)		Business (total=1.3 million overnight visits)		VFR (total=1.3 million overnight visits)	
% of Overnight U.S. Pleasure Visits from:		% of Overnight U.S. Business Visits from:		% of Overnight U.S. VFR Visits from:	
Michigan	24%	Michigan	9%	Michigan	24%
New York	20%	New York	8%	New York	22%
Ohio	11%	California	7%	California	6%
Pennsylvania	7%	Illinois	7%	Ohio	5%
Minnesota	5%	Texas	5%	New Jersey	4%
Illinois	5%	Pennsylvania	5%	Pennsylvania	4%

Special ITS U.S. Tabulations, MTCR, page P2-1.

Michigan was the largest source of overnight pleasure, business and VFR visits to Ontario. As Chart 1 indicates, the U.S. states around the Great Lakes did not dominate Ontario's overnight business travel market to the same extent that they dominated the overnight pleasure or VFR markets. These seven states accounted for 77% of the overnight pleasure

visits and 63% of the overnight VFR visits to Ontario, but only for 39% of the provincial overnight business visits.

Length of Stay in Ontario Because of the large number of same day visitors to Ontario, the average length of stay among all visitors was less than one night (0.86). Overnight visitors had an average length of stay in Ontario of 3.3 nights.

Overnight U.S. visitors who visited Ontario during the first calendar quarter had the shortest average stay in the province (2.5 nights), while those who visited the province during the third quarter had the longest (3.7 nights).

Overnight visitors from Wisconsin had the highest average length of stay in Ontario (4.3 nights), followed by visitors from states outside the Great Lakes region (4.1 nights), visitors from Pennsylvania (3.7 nights) and visitors from Illinois (3.6 nights).

Overnight U.S. visitors in Ontario on a trip to see friends or relatives averaged about four nights in the province whereas trips made for pleasure averaged just over three nights (3.3 nights). Business trips kept the U.S. overnight visitor in Ontario for close to three nights (2.8 nights).[21]

Party Size Travelling parties from the U.S. on a same day visit to Ontario had an average size of 2.0 persons, while those on an overnight visit had an average size of 2.1 persons. Business travellers are more apt to be travelling "solo" than are those travelling for other purposes. This reality is reflected in the smaller party size for overnight business travellers in the province (1.4 persons) than is evident for those on overnight pleasure trips (2.5 persons) or trips to see friends and relatives (1.8 persons).[22]

Party Composition The vast majority of U.S. visitors to Ontario (90%) travelled in parties comprised of adults only. The remainder (10%) travelled in parties with adults and at least one child less than 15 years old. Of the parties comprised of adults only, over two-fifths were one-adult parties (43%), about the same proportion were two-adult parties (45%) and one-eighth were in parties of three or more adults (12%).[23]

Age and Gender The average U.S. visitor to Ontario was 45 years old and was slightly more likely to be a male (52%) than a female (48%).[24]

The average overnight U.S. visitor was also 45 years old. Within the overnight visitor segment, there are slightly more males (52%) than females (48%).

About twice as many U.S. visitors to Ontario are at the older end of the age spectrum (17% are 65 years of age or over) as are at the young end (9% are under 15 years). There are no appreciable differences in the average ages of overnight visitors from Ontario's major U.S. feeder markets but men from Wisconsin (60%) and Minnesota (64%) are especially likely to travel to the province on an overnight trip, possibly because hunting and fishing are especially popular among visitors from these two states.

Accommodation Most of the 25.0 million person nights in the province by U.S. visitors were spent in roofed commercial accommodation (54% or 13.5 million person nights). Hotels were especially popular, accounting for 3-in-10 person nights or 7.3 million. Motels (2.4 million person nights) and commercial cottages or cabins (3.8 million person nights) were also widely used by U.S. visitors in 2000. Approximately one-fifth of the nights spent by these visitors in 2000 were spent in private homes (5.1 million person nights), a further 1.7

million were spent in private cottages, and 1.4 million were spent in campgrounds or trailer parks in the province.[25]

CHART 2: Overnight Person Visits from U.S. by Accommodation Type

Type of Accommodation	Share of U.S. Person Nights in Ontario	Average Length of Stay in Ontario (nights)	Average Party Size (persons)	Proportion of "Adults-Only" Parties
Hotel	29%	2.3	1.9	91%
Motel	10%	1.9	2.2	89%
Commercial Cottage	15%	5.2	3.1	77%
Camping/Trailer Park	5%	3.4	2.5	78%
Home of Friend/Relative	20%	3.6	1.8	89%
Private Cottage	7%	4.4	2.3	83%

Source: Special ITS U.S. Tabulations, MTCR, P16-1, M38-1, M39-1 The balance of nights are described as "other" accommodation type or not specified by the respondent.

The incidence of commercial roofed accommodation usage among overnight U.S. visitors varied considerably from state to state, ranging from a low of 46% for New York to a high of 68% for Ohio.

Pleasure visitors generated 60% of all the person nights spent in commercial roofed accommodation. Visitors whose primary trip purpose was business generated 23% of the nights spent in commercial roofed accommodation, while those whose primary trip purpose was VFR generated 7% of these nights.

Commercial cottages experienced the longest average lengths of stay in 2000 and were visited by parties with the largest average size. Along with campgrounds, commercial cottages were most apt to appeal to U.S. travel parties that included children.

Activities Shopping was the most popular activity engaged in by overnight U.S. visitors to Ontario (56%), followed by sightseeing (49%), dining at high quality restaurants (39%), visiting friends or relatives (31%), participation in sports or outdoor activities (29%) and visiting national, provincial, regional parks or historical sites (27%).

Chart 3 shows the top three activities of overnight visitors from selected states. Visitors from New York, Michigan, Pennsylvania, Illinois and Wisconsin had shopping as the top activity engaged in during their trip, while visitors from Ohio favoured sightseeing. Visitors from Minnesota favoured the outdoors.

The ranking of activities does not change appreciably in the overnight pleasure market, although sightseeing and participation in outdoor activities are more prominent among U.S. overnight pleasure visitors from most states than they are in the general U.S. overnight travelling population.

CHART 3: Activities Participated in During the Trip
Overnight Visitors from U.S.

Origin	All Main Purposes		Main Purpose Pleasure	
New York	Shopping	56%	Shopping	63%
	Sightseeing	40%	Sightseeing	48%
	Dining*	35%	Outdoors**	39%
Michigan	Shopping	52%	Shopping	62%
	Sightseeing	39%	Sightseeing	50%
	Dining*	33%	Dining*	37%
Pennsylvania	Shopping	63%	Sightseeing	72%
	Sightseeing	63%	Shopping	68%
	Dining*	43%	Outdoors**	44%
Minnesota	Outdoors**	60%	Outdoors**	64%
	Shopping	41%	Sightseeing	43%
	Sightseeing	40%	Shopping	39%
Ohio	Sightseeing	62%	Sightseeing	79%
	Shopping	61%	Shopping	73%
	Dining*	38%	Visit Park/Historic site	42%
Illinois	Shopping	54%	Sightseeing	67%
	Sightseeing	52%	Shopping	59%
	Dining*	40%	Visit Park/Historic site	47%
Wisconsin	Shopping	51%	Sightseeing	57%
	Sightseeing	49%	Shopping	52%
	Outdoors**	48%	Outdoors**	51%
Other USA	Shopping	60%	Sightseeing	80%
	Sightseeing	55%	Shopping	74%
	Dining*	47%	Visit Park/Historic site	55%

Source: Special ITS U.S. Tabulations, MTCR, P24; M15/16-1. *Dining at a high quality restaurant. **Any outdoor sport or activity.

CHART 4: Rating of Services in Canada Compared to the U.S.A. among Overnight Person Visits from U.S.

Origin of Visitors	Transport Services	Accom. Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
New York					
Better	21%	17%	38%	59%	32%
Same	73%	76%	57%	27%	61%
Worse	7%	7%	4%	14%	7%
Michigan					
Better	28%	14%	44%	59%	26%
Same	68%	80%	53%	28%	67%
Worse	5%	6%	3%	14%	7%
Pennsylvania					
Better	23%	14%	39%	50%	26%
Same	74%	79%	58%	33%	69%
Worse	4%	7%	3%	17%	5%
Minnesota					
Better	5%	7%	34%	50%	19%
Same	73%	83%	59%	36%	69%
Worse	22%	10%	8%	14%	13%
Ohio					
Better	23%	12%	41%	51%	27%
Same	71%	79%	54%	34%	67%
Worse	6%	9%	5%	16%	6%
Illinois					
Better	15%	11%	42%	52%	15%
Same	69%	74%	56%	36%	71%
Worse	17%	16%	3%	12%	14%
Wisconsin					
Better	16%	10%	30%	42%	17%
Same	63%	73%	66%	40%	72%
Worse	22%	18%	4%	19%	11%
Other USA					
Better	26%	12%	40%	59%	17%
Same	65%	79%	55%	28%	77%
Worse	9%	9%	5%	13%	6%

Source: Special ITS U.S. Tabulations, MTCR, P36-1/3

"Better", "same" and "worse" [*not as good*] are consumers' ratings of their trip in Canada "*in comparison with the USA*".

Rating of Services Visitors were asked to rate various aspects of their trip experience in Canada relative to the U.S.A. There is no single pattern in their responses although most overnight U.S. visitors rate transportation, accommodation, hospitality of local people, and the variety of things to see and do as "the same" as what might be found in the U.S.A. They do, however, seem to recognize that there is a favourable exchange rate. At least half of the U.S. overnight visitors from most major feeder regions state that they believe value for money in Canada is "better than" the value they would obtain in the U.S.A.

CHART 5: The Top Overnight Markets for each of Ontario's Travel Regions
Total Overnight Person-Visits from U.S.

Region Visited	% of Overnight U.S. Visits to Regions from Various States	
1: Southwestern Ontario	Michigan	60%
(total overnight U.S. visits=1,267,000)	Ohio	13%
	Illinois	6%
	New York	5%
2: Festival Country	New York	26%
(total overnight U.S. visits=2,050,000)	Michigan	15%
	Ohio	13%
	Pennsylvania	8%
3: Lakelands	Michigan	34%
(total overnight U.S. visits=139,000)	New York	12%
	Illinois	8%
	Ohio	7%
4: Metro Toronto	New York	19%
(total overnight U.S. visits=2,267,000)	Michigan	14%
	Ohio	7%
	Illinois	7%
5: Getaway Country	Michigan	22%
(total overnight U.S. visits=368,000)	New York	18%
	Ohio	7%
	California	5%
6: Ontario East	New York	33%
(total overnight U.S. visits=986,000)	Pennsylvania	13%
	California	5%
	Michigan	5%
Regions 7-12: Northern Ontario	Minnesota	23%
(total overnight U.S. visits=1,165,000)	Michigan	17%
	Wisconsin	12%
	Ohio	7%

Source: Special ITS U.S. Tabulations, MTCR, R4-1/2

Regional Visitation The vast majority of the same day person-visits from the U.S. to Ontario accrued to Southwestern Ontario (49% or 10.6 million) and to Festival Country (34% or 7.3 million). These two regions are major land ports between Canada and the U.S. They also have major gaming attractions that have had considerable appeal to the U.S. cross-border market.[26]

Metro Toronto (30% or 2.3 million visits), Festival Country (27% or 2.1 million visits) and Southwestern Ontario (17% or 1.3 million visits) were the most popular regions for overnight travel. Chart 5 shows the top overnight travel markets for each of Ontario's six southern travel regions and for the six northern regions as a combined unit (unduplicated visits to

Ontario's north). Information on each of the six northern regions is contained in the detailed tabulations.[27]

CHART 6: Total Person Visits in Ontario from U.S.
by Average Length of Stay and Party Size

Region Visited	Average Length of Stay (Nights)		Average Party Size (Persons)	
	All Visits	Overnight Visits	All Visits	Overnight Visits
1: Southwestern Ontario	0.2	2.3	2.0	2.0
2: Festival Country	0.5	2.3	2.2	2.3
3: Lakelands	3.2	3.6	2.1	2.1
4: Metro Toronto	1.8	2.7	1.8	1.8
5: Getaway Country	2.9	3.9	2.0	1.9
6: Ontario East	1.7	3.5	2.1	2.0
Regions 7-12: Northern Ontario	2.0	4.5	2.3	2.5

Source: Special ITS U.S. Tabulations, MTCR, R14-1, R24-2

U.S. visitors in Getaway Country, Lakelands and Northern Ontario tended to spend more nights in these regions than did those who visited other parts of the province. On average, an overnight U.S. visitor in Getaway Country (3.9), Lakelands (3.6) or the northern part of the province (4.5 nights) spent close to four nights in the region whereas those who went to Southwestern Ontario or Festival Country spent closer to two nights in the region. U.S. overnight visitors to Metro Toronto and Eastern Ontario spent closer to three nights in these regions, on average, in 2000.

Party size for U.S. visitors is relatively stable from one region to the next, although Northern Ontario attracts overnight U.S. visitors who have slightly larger party sizes than do other regions.

Trips by U.S. overnight visitors to most of Ontario's travel regions tend to be motivated by pleasure, followed by visiting friends and relatives (VFR). Business travel is especially common among U.S. overnight visitors in Metro Toronto (37%) and Getaway Country (19%).

CHART 7: Total Person Visits in Ontario from U.S.			
Region Visited	% of Visits to a Region by Main Purpose of Trip	All Visits	Overnight Visits
1: Southwestern Ontario	Pleasure	44%	57%
	VFR	16%	23%
	Business	5%	7%
	Personal/Other	26%	14%
2: Festival Country	Pleasure	57%	69%
	VFR	12%	14%
	Business	4%	10%
	Personal/Other	18%	7%
3: Lakelands	Pleasure	49%	52%
	VFR	32%	31%
	Business	11%	11%
	Personal/Other	8%	7%
4: Metro Toronto	Pleasure	43%	39%
	VFR	14%	17%
	Business	31%	37%
	Personal/Other	10%	7%
5: Getaway Country	Pleasure	34%	38%
	VFR	35%	34%
	Business	21%	19%
	Personal/Other	9%	9%
6: Ontario East	Pleasure	56%	55%
	VFR	19%	23%
	Business	11%	16%
	Personal/Other	9%	6%
Regions 7-12: Northern Ontario	Pleasure	61%	77%
	VFR	9%	6%
	Business	3%	2%
	Personal/Other	22%	14%
Source: Special ITS U.S. Tabulations, MTCR, P41-1; P42-1, horizontal %s.			

Expenditures U.S. visitors spent $4.319 million in the province and an additional $804 million on Canadian carrier fares in order to get here, for a total of $5.124 million of U.S. residents' spending in 2000. Ontario represents half of all spending by U.S. visitors in Canada ($5.124 million out of $10.422 million).[28]

Put within the context of Ontario's balance of payments on the Tourism Account, in 2000 Ontarians spent $5,044 million in the U.S. and a further $928 million on U.S. fares to get to their destinations which when combined with the $5,124 million in receipts yields a deficit of $848 million with the U.S. In other words, Ontarians spent $848 million more in the U.S. than the residents of the U.S. spent in Ontario (fares are included).

U.S. visitors on a same day visit to Ontario spent a total of $1.698 million, whereas those who stayed in Ontario for one or more nights spent $3.426 million, or $453.00 per person visit. The overall average (any length of stay) was $176.00 per person visit.[29]

CHART 8: Total U.S. Visitors' Expenditures Assigned to Ontario

Country of Origin	Total Expenditures (millions)	Average Spending* Per Person Visit	
		All Visits	Overnight Visits
Michigan	$1,236	$102.00	$255.00
New York	$863	$100.00	$298.00
Ohio	$352	$235.00	$363.00
Pennsylvania	$218	$246.00	$388.00
Illinois	$244	$446.00	$591.00
Wisconsin	$95	$291.00	$391.00
Minnesota	$161	$173.00	$380.00
All other U.S. States	$1,954	$472.00	$712.00
Total U.S.	$5,124	$176.00	$453.00

Source: Special ITS U.S. Tabulations, MTCR, P29, P31; P32-1. *Average spending per person visit in Ontario including domestic carrier fares.

The overall average expenditure per person visit ranged from a low of $100.00 for New York visitors to a high of $446.00 for Illinois residents and $472.00 for U.S. visitors who live outside the Great Lakes states. These estimates include the cost of getting to Canada from the U.S. for visitors who relied on a Canadian domestic carrier for their international travel.[30]

The same spending pattern emerges when carrier fares to reach Canada are excluded. In this scenario, reflecting spending on core tourism services such as accommodation, food/beverages, entertainment and local/inter-regional transportation within Canada, visitors in Ontario from states outside the Great Lakes region and those from Illinois remain the biggest spenders on a per person basis, (see Chart 9).

CHART 9: Total U.S. Visitors' Expenditures Assigned to Ontario (Excludes Public Transport Fares to and from Canada/Ontario)			
Country of Origin	Total Expenditures (millions)	Average Spending* Per Person Visit: All Visits	Overnight Visits
Michigan	$1,226	$101.00	$252.00
New York	$755	$87.00	$248.00
Ohio	$296	$197.00	$327.00
Pennsylvania	$189	$214.00	$356.00
Illinois	$200	$366.00	$509.00
Wisconsin	$90	$277.00	$379.00
Minnesota	$157	$168.00	$373.00
All other U.S. States	$1,406	$340.00	$546.00
Total U.S.	$4,319	$149.00	$380.00

Source: Special ITS U.S. Tabulations, MTCR, P29, P31; P32-1. *Average spending per person visit in Ontario excluding domestic carrier fares.

U.S. visitors travelling primarily for pleasure spent more money in Ontario than did those travelling for any other purpose ($2,133 million). Their spending is roughly commensurate with the travel volume represented by the main purpose.[31] A different pattern is evident for business travel. This market represents only 8% of all U.S. tourism in Ontario in 2000, but generates 23% of U.S. spending in the province ($993 million). The importance of business travel is evident in the higher yield per trip generated by this type of travel. Each U.S. business traveller spends approximately $400.00 in Ontario compared to between $84.00 and $146.00 on average for VFR or pleasure U.S. visitors (figures are rounded – see Chart 10).

In light of the fact that over one-third of all U.S. travel in Ontario takes place in the third calendar quarter (35%), it is not surprising that spending is also concentrated in this season ($1,688 million or 39%). Average spending by U.S. visitors in the first quarter (Jan – Mar) and fourth quarter (Oct – Dec) is marginally lower – at about $130.00 per person visit – than is the case for the other quarters. These lower spending levels likely reflect the shorter stays by U.S. visitors in the province during the colder months. In contrast, average spending by U.S. visitors is highest in the third quarter (Jul – Sep), at about $165.00. These third quarter trips also tend to be about one night longer than trips taken by U.S. visitors to the province in the first and fourth quarters.[32]

CHART 10: U.S. Visitors' Expenditures Assigned to Ontario by Trip Purpose & Season (Excludes Public Transport Fares to and from Canada/Ontario)			
Trip Purpose	**Total Expenditures (millions)**	**Average Spending* Per Person Visit: All Visits**	**Overnight Visits**
Pleasure	$2,133	$146.00	$335.00
VFR	$341	$84.00	$229.00
Business	$993	$416.00	$708.00
Season			
Quarter I	$703	$132.00	$328.00
Quarter II	$1,120	$147.00	$386.00
Quarter III	$1,688	$166.00	$389.00
Quarter IV	$809	$136.00	$387.00

Source: Special ITS U.S. Tabulations, MTCR P29,; P31; P32-1. *Average spending per person visit in Ontario excluding domestic carrier fares.

U.S. visitors in Ontario exhibit somewhat different spending patterns depending on whether they spend their nights in the province's paid, roofed lodging or in private homes or campgrounds. For example, overnight U.S. business travellers spend their nights in hotels in the province – 76% of them only use hotels in Ontario.[33] In turn, these business travellers spend over half of their total spending in the province on accommodation (52%).

In contrast, U.S. overnight pleasure travellers are likely to divide their accommodation in the province between roofed commercial lodgings (59%) and non-commercial or camping facilities (41%).[34] These pleasure travellers spend about one-third of their total spending on lodging in Ontario (37%). Many U.S. visitors who are travelling to see friends and relatives also *stay with* friends or relatives rather than utilizing paid lodging facilities in the province. As a consequence, these travellers spend comparatively little on accommodation in Ontario (17%).

CHART 11: Distribution of Total U.S. Expenditures in Ontario by Item of Expenditure (Excludes Public Transport Fares to and from Canada/Ontario)						
Item of Expenditure	**Pleasure**		**VFR**		**Business**	
	All Visits	**Overnight Visits**	**All Visits**	**Overnight Visits**	**All Visits**	**Overnight Visits**
Accommodation	25%	37%	14%	17%	48%	52%
Auto/Local Transport	10%	10%	13%	13%	15%	14%
Food & Beverage	24%	21%	31%	30%	23%	21%
Entertainment	22%	17%	17%	15%	5%	6%
Retail/Other	19%	15%	25%	25%	9%	8%

Source: Special ITS U.S. Tabulations, MTCR, page P29, P30.

Metro Toronto not only received the largest share of U.S. expenditures in Ontario (38%), but its visitors also had the highest average spending per person visit of Ontario's travel regions. This region attracts a disproportionately high number of business travellers. It is also the "reception" point for many U.S. travellers because it has Canada's largest international airport. These factors likely explain the high volume and average spending in this region ($511.00).

Southwestern Ontario, with a major border crossing to the U.S. and an important gaming attraction, attracted one-fifth of the U.S. visitor spending in 2000 (21%). Because much of the U.S. traffic into this region is same-day, however, the per visit costs are comparatively low ($91.00). A similar pattern is evident for Festival Country. Many U.S. visitors enter Canada in the region to see Niagara Falls and/or visit the casino there. These visitors spend just under one-fifth of all U.S. tourism spending in the province (18%), but much of the visitation is same-day. The short stays of many visitors to this region are reflected in the relatively low per visit spending ($97.00).

CHART 12: Total U.S. Expenditures Assigned to Ontario's Regions

Region	Total Expenditures (millions)	Average Spending per Visit* All Visits	Average Spending per Visit* O/night Visits
1: Southwestern Ontario	$1,089	$91.00	$213.00
2: Festival Country	$926	$97.00	$243.00
3: Lakelands	$111	$300.00	$328.00
4: Metro Toronto	$1,922	$511.00	$649.00
5: Getaway Country	$123	$252.00	$316.00
6: Ontario East	$400	$198.00	$344.00
Regions 7-12: Northern Ontario	$550	$211.00	$396.00
Region Unknown	$3	N/A	N/A

Source: Special ITS U.S. Tabulations, MTCR, P43, R13

* Some regions, especially Metro Toronto, were assigned transport fares of travellers who were in transit and did not visit the region. The averages shown in this table exclude these transport fares.

COMPARISON OF KEY FINDINGS U.S. MARKET: 1994 through 2000

Total visitation to Ontario from the U.S. declined between 1999 and 2000 by 3%. The 29.088 million U.S. visitors in the province in 2000 represent a twenty-four percent increase over 1994 (23,482 million). Most major U.S. feeder markets have experienced growth since 1994, with the most substantive increases evident in Minnesota (+71%), Michigan (+26%), Ohio (+20%), and states outside the Great Lakes region (+34%). Over the past year, however, the declines in U.S. visitors to Ontario are most evident for Wisconsin (-20%) and Illinois (-15%), followed by Ohio (-8%).

CHART 13: Total Person Visits to Ontario from U.S. by Origin

Origin of Visitors	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Michigan	9,622	41%	11,274	43%	12,388	41%	12,514	42%	12,106	42%
New York	7,257	31%	7,295	28%	8,566	28%	8,683	29%	8,652	30%
Ohio	1,251	5%	1,483	6%	1,669	6%	1,632	5%	1,498	5%
Pennsylvania	842	4%	978	4%	874	3%	938	3%	886	3%
Minnesota	547	2%	646	3%	973	3%	862	3%	935	3%
Illinois	521	2%	706	3%	624	2%	640	2%	547	2%
Wisconsin	344	2%	415	2%	421	1%	407	1%	327	1%
All Other	3,098	13%	3,473	13%	4,653	15%	4,355	15%	4,139	14%
Total US	23,482	100%	26,270	100%	30,168	100%	30,031	100%	29,088	100%

Source: Special ITS U.S. Tabulations, MTCR, P1-2

Consistent with all travel from the U.S., overnight visitors from these markets also decreased slightly between 1999 and 2000 (-3%), primarily as a result of decreased overnight visitation from residents of Wisconsin (-17%), Illinois (-9%) and Pennsylvania (-7%).

U.S. visitors in 2000 are similar to those who came to the province in 1999 with respect to their length of stay in the province. Three-quarter continue to spend less than 24 hours in the province, with an average length of stay of 0.86 nights (all U.S. visitors) in 2000.

The current inbound U.S. market is somewhat more likely to spend nights in the province now (74%) than was the case in 1994 (71%) but the length of stay among overnight U.S. visitors has remained constant at just over three nights.

CHART 14: Total Overnight Person Visits to Ontario from U.S. by Origin

Origin of Visitors	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Michigan	1,525	22%	1,407	21%	1,678	21%	1,661	21%	1,693	22%
New York	1,441	21%	1,259	19%	1,511	19%	1,449	19%	1,389	18%
Ohio	676	10%	696	10%	719	9%	700	9%	684	9%
Pennsylvania	531	8%	516	8%	458	6%	484	6%	449	6%
Minnesota	343	5%	360	5%	396	5%	308	4%	318	4%
Illinois	220	3%	276	4%	310	4%	415	5%	377	5%
Wisconsin	218	3%	237	4%	283	4%	277	4%	229	3%
All Other	1,856	27%	2,003	30%	2,505	32%	2,497	32%	2,424	32%
Total US	6,808	100%	6,756	100%	7,860	100%	7,792	100%	7,564	100%

Source: Special ITS U.S. Tabulations, MTCR, P2-1

"Pleasure" continues to be the dominant trip purpose among U.S. visitors (50%). This motivation has remained constant over the past six years. Business travel and trips to see friends and relatives have also remained stable over the past few years.

The same pattern of stability in trip purpose is evident for overnight U.S. tourism in Ontario.

CHART 15: Duration of U.S. Person Visits in Ontario

Length of Stay in Ontario	1994		1996		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Same Day	16,674	71%	19,514	74%	22,308	74%	22,239	74%	21,524	74%
Overnight	6,808	29%	6,756	26%	7,860	26%	7,792	26%	7,564	26%
Total	23,482	100%	26,270	100%	30,168	100%	30,031	100%	29,088	100%
Average Length of Stay in Ontario (in nights)										
All Visitors	0.93	-	0.83	-	0.81	-	0.86	-	0.86	-
Overnight Visitors	3.2	-	3.2	-	3.1	-	3.3	-	3.3	-

Source: Special ITS U.S. Tabulations, MTCR, S1-1, P-35

CHART 16: Total Person Visits in Ontario from U.S.

Main Purpose of Trip	1994		1995		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Pleasure	11,225	48%	14,165	54%	15,382	51%	15,320	51%	14,653	50%
Business	2,015	9%	2,224	9%	2,341	8%	2,476	8%	2,384	8%
VFR	3,946	17%	3,811	15%	4,182	14%	4,305	14%	4,047	14%
Personal/ other	4,540	19%	4,878	19%	6,093	20%	5,747	19%	5,734	20%
Total	23,482	100%	26,270	100%	30,168	100%	30,031	100%	29,088	100%

Source: Special ITS U.S. Tabulations, MTCR, P-7

CHART 17: Total Overnight Person Visits in Ontario from U.S.

Main Purpose of Trip	1994		1995		1998		1999		2000	
	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)	Visitors (000's)	Share (%)
Pleasure	3,994	59%	3,893	58%	4,573	58%	4,464	57%	4,239	56%
Business	1,012	15%	1,090	16%	1,308	17%	1,347	17%	1,287	17%
VFR	1,187	17%	1,100	16%	1,290	16%	1,307	17%	1,314	17%
Personal/ other	609	9%	671	10%	678	9%	671	9%	720	10%
Total	6,808	100%	6,756	100%	7,860	100%	7,792	100%	7,564	100%

Source: Special ITS U.S. Tabulations, MTCR, P-8

Hotels remain the most popular form of lodging among U.S. visitors in Ontario. Two-fifths of these overnight visitors spend at least one night in a hotel during their stay in the province. The incidence of using motels (17%), commercial cottages (10%) and camping facilities in Ontario (5%) has remained very stable over the past few years. Reliance on non-commercial accommodation such as the homes of friends and relatives is also unchanged since 1999.

Ontario's U.S. overnight visitors have maintained a very consistent activity pattern over the years. In 2000, they are as likely to engage in shopping, sightseeing, visit a park or historic site, go to a museum, zoo or natural display, and/or dine in a restaurant while travelling in Canada as they were in previous years.

CHART 18: Type of Accommodation Used in Ontario by U.S. Visitors
Percent of Overnight Person Visits by Accommodation Type Used in Ontario

Type Of Accommodation Used	1994	1996	1998	1999	2000
Hotel	39%	41%	41%	41%	42%
Motel	21%	20%	19%	18%	17%
Camping/Trailer Park	6%	6%	7%	6%	5%
Commercial Cottage	10%	10%	9%	10%	10%
Commercial Unspecified	5%	4%	4%	4%	4%
Any Commercial	76%	77%	75%	76%	74%
Home of Friends or Relatives	20%	19%	18%	19%	19%
Private Cottage	4%	4%	4%	5%	5%
Non-Commercial Unspecified	3%	3%	3%	4%	4%
Any Non-commercial	26%	25%	25%	27%	27%
Other/unknown	4%	4%	6%	6%	6%

Source: Special ITS U.S. Tabulations, MTCR, M-14.

Similarly, U.S. travellers on overnight pleasure trips have an activity profile in 2000 that is the same as they have had over the past six years.

There are no differences between 1999 and 2000 in the region-to-region pattern of U.S. travel within the province. Southwestern Ontario attracted 4-in-10 U.S. visitors' stops in 1999 and continues to attract this level in 2000 (41%). Similarly, just over 3-in-10 U.S. visitors stopped for a night or took a day excursion to Festival Country in 1999 and in 2000. About 1-in-12 U.S. visitors stopped in Ontario East in each of these years (7% in 2000).

CHART 19: Activities Participated in During the Trip
Total Overnight Person Visits in Ontario from U.S.*

Activity on Trip	1994		1996		1998		1999		2000	
	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure	All O/night Visits	O/night Pleasure
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Shopping	58%	66%	57%	64%	56%	62%	57%	65%	56%	65%
Sightseeing	53%	68%	52%	66%	50%	61%	51%	63%	49%	62%
Dining at high quality restaurants	38%	39%	40%	40%	38%	38%	39%	38%	39%	38%
Visit park or historic site	28%	38%	29%	39%	31%	41%	29%	40%	27%	38%
Outdoors or sports	31%	39%	30%	39%	29%	36%	30%	39%	29%	38%
X-country skiing	*	1%	1%	1%	*	*	*	*	*	*
Downhill	*	*	1%	1%	*	*	*	1%	1%	1%
Hunting/fishing	13%	16%	12%	15%	11%	15%	11%	15%	11%	16%
Water-based	20%	26%	19%	26%	18%	25%	20%	27%	15%	21%
Visit zoo, museum, or natural display	19%	25%	18%	24%	17%	21%	17%	23%	16%	21%
Visit theme park	5%	7%	5%	6%	5%	6%	4%	6%	4%	5%
Attend festivals/fairs	7%	9%	7%	9%	6%	7%	7%	9%	7%	9%
Attend sports event	5%	4%	7%	6%	6%	6%	5%	6%	5%	5%
Attend cultural event	16%	20%	16%	22%	13%	18%	13%	17%	13%	17%
Nightlife/ entertainment	18%	19%	18%	19%	18%	18%	19%	19%	19%	19%
Visiting friends or relatives	30%	15%	30%	16%	29%	16%	31%	19%	31%	19%
Other	6%	6%	6%	7%	7%	7%	7%	7%	8%	9%

Source: Special ITS U.S. Tabulations, MTCR, P24. *Less than 0.5%. Columns add to more than 100% because visitors may have participated in more than one activity on their trip.

Even though some tourism regions in the province experienced declines or modest increases in 2000 over their 1999 level of visitation, the relative share each tourism region captures of the U.S. overnight market remains unchanged. For example, Festival Country experienced a decline of 8% in U.S. overnight visitors in 2000, but continues to represent about the same share of all overnight U.S. visits in Ontario (27%).

CHART 20: Total Person Visits in Ontario from U.S.

	1994		1996		1998		1999(A)		1999(B)		2000	
Region Visited	'000s	%	'000s	%	'000s	%	'000s	%	'000s	%	'000s	%
1: Southwestern Ontario	9,106	39	11,180	43	12,611	42	12,474	42	12,545	42	11,903	41
2: Festival Country	7,050	30	7,540	29	10,064	33	9,531	32	9,768	33	9,556	33
3: Lakelands	232	1	268	1	347	1	373	1	390	1	370	1
4: Metro Toronto	3,747	16	3,779	14	3,262	11	3,597	12	3,750	13	3,526	12
5: Getaway Country	484	2	428	2	418	1	427	1	495	2	487	2
6: Ontario East	1,878	8	1,957	7	1,756	6	2,013	7	2,036	7	2,025	7
7: Near North	81	*	73	*	95	*	94	*	102	*	105	*
8: Rainbow Country	102	*	89	*	177	1	129	*	140	1	121	*
9: Algoma Country	710	3	801	3	1,031	3	992	3.3	1,017	3	1,010	4
10: James Bay Frontier	26	*	54	*	39	*	48	*	49	*	41	*
11: North of Superior	348	2	381	2	520	2	523	2	534	2	464	2
12: Sunset Country	586	2	628	2	918	3	872	3	883	3	954	3
Region Unknown	9	*	9	*	4	*	12	*	13	*	7	*

Source: Special ITS U.S. Tabulations, MTCR, P41. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario. 1999A = without same day excursions taken by overnight visitors; 1999B = with same day excursions taken by overnight visitors. NOTE: 1999A is directly comparable to previous years; 1999B is directly comparable to 2000 and beyond.

The pattern of visiting within the province in 2000 among U.S. travellers on *all* overnight trips and those motivated by *pleasure* is essentially the same as it was in 1999.

CHART 21: Overnight Person Visits in Ontario from U.S.

Region Visited	1994		1996		1998		1999		2000	
	'000's	Share	'000's	Share	'000's	Share	'000's	Share	'000's	Share
1: Southwestern	1,086	16%	1,028	15%	1,272	16%	1,273	16%	1,267	17%
2: Festival Country	1,955	29%	1,784	26%	2,474	32%	2,232	29%	2,050	27%
3: Lakelands	220	3%	218	3%	320	4%	341	4%	330	4%
4: Metro Toronto	2,190	32%	2,296	34%	2,178	28%	2,341	30%	2,267	30%
5: Getaway Country	354	5%	379	6%	354	5%	361	5%	368	5%
6: Ontario East	871	13%	924	14%	952	12%	1,007	13%	986	13%
7: Near North	76	1%	71	1%	93	1%	91	1%	94	1%
8: Rainbow Country	95	1%	80	1%	173	2%	128	2%	116	2%
9: Algoma Country	278	4%	296	4%	438	6%	357	5%	328	4%
10: James Bay F.	25	*	43	1%	35	*	36	1%	38	1%
11: North of Sup.	215	3%	235	4%	255	3%	240	3%	250	3%
12: Sunset Country	280	4%	307	5%	388	5%	425	6%	395	5%
Region Unknown	2	*	4	*	1	*	3	*	3	*

Source: Special ITS U.S. Tabulations, MTCR, P42. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario.

CHART 22: Overnight Person Visits in Ontario from U.S. Main Purpose Pleasure

Region Visited	1994		1996		1998		1999		2000	
	'000's	Share	'000's	Share	'000's	Share	'000's	Share	'000's	Share
1: Southwestern	568	14%	540	15%	683	15%	717	16%	716	17%
2: Festival Country	1,253	31%	1,234	33%	1,716	38%	1,514	34%	1,412	33%
3: Lakelands	143	4%	131	4%	167	4%	187	4%	170	4%
4: Metro Toronto	1,155	29%	1,100	30%	887	19%	958	22%	883	21%
5: Getaway Country	198	5%	177	5%	132	3%	163	4%	139	3%
6: Ontario East	508	13%	523	14%	540	12%	583	13%	540	13%
7: Near North	54	1%	45	1%	84	2%	72	2%	76	2%
8: Rainbow Country	77	2%	54	2%	101	2%	87	2%	76	2%
9: Algoma Country	245	6%	258	7%	381	8%	318	7%	269	6%
10: James Bay F.	17	*	31	1%	27	1%	26	1%	28	1%
11: North of Sup.	150	4%	167	5%	193	4%	184	4%	181	4%
12: Sunset Country	207	5%	237	6%	308	7%	339	8%	317	8%
Region Unknown	2	*	3	*	1	*	2	0%	3	*

Source: Special ITS U.S. Tabulations, MTCR, P42. *Less than 0.5%. Regions do not add to the provincial total because visitors may have visited more than one region during their stay in Ontario.

At $5.124 million, total spending by U.S. visitors in Ontario in 2000 increased by 4% over 1999, primarily as a result of substantial increases in air carrier accruals to the province. These fares increased by 18% between 1999 and 2000.

When inflationary impacts are removed, real expenditures in Ontario by U.S. visitors (measured in 1992 dollars) decreased by –0.6% from $4.093 billion in 1999 to $4.068 in 2000. Compared to 1994, real U.S. expenditures in Ontario increased in 2000 by 49.1% from $2.782 billion in 1994.

Average expenditures per person visit increased, in constant 1992 dollars, in 2000 by 2.9% over 1999 and by 20.7% over 1994.

The ways in which U.S. visitors spend their money in Ontario has not changed appreciably over time. Various categories of spending such as accommodation (22%), food and beverages (21%), entertainment and recreation (16%) and retail/other (15%) have remained stable between 1999 and 2000. At the same time, commercial carrier fares have increased substantially since 1994. Then, they accounted for 8% of the U.S. visitors' spending, whereas now they account for twice this proportion (16%).

Although there have been some fluctuations in the amount of spending U.S. visitors do in Ontario's tourism regions since 1994, there are no substantive changes in the share of total spending that accrues to each region between 1999 and 2000 (see Chart 25).

CHART 23: Total U.S. Expenditures in Ontario

	1994		1996		1998		1999		2000	
Item of Expenditure	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)	$ in millions	Share (%)
Accommodation	$706	26%	$817	25%	$1,103	23%	$1,106	23%	$1,142	22%
Food & Beverage	$701	26%	$829	25%	$1,030	22%	$1,051	21%	$1,055	21%
Canadian Carrier fares	$214	8%	$346	10%	$557	12%	$682	14%	$804	16%
Public/Local Transport	$64	2%	$79	2%	$103	2%	$122	3%	$129	3%
Private Transport	$222	8%	$260	8%	$438	9%	$476	10%	$381	7%
Recreation/ Entertainment	$422	15%	$552	17%	$799	17%	$771	16%	$828	16%
Retail/Other	$413	15%	$436	13%	$683	15%	$716	15%	$784	15%
Total	$2,741	100%	$3,319	100%	$4,713	100%	$4,924	100%	$5,124	100%

Source: Special ITS U.S. Tabulations, MTCR, P29.

CHART 24: Distribution of U.S. Expenditures in Ontario by Length of Stay and Average Expenditures per Visit

	1994	1996	1998	1999	2000
Same Day	28%	32%	32%	34%	33%
Overnight	72%	68%	68%	66%	67%
Total	100%	100%	100%	100%	100%
Average Expenditures Per Person Visit:					
Same Day	$46	$54	$72	$74	$79
Overnight	$289	$336	$396	$419	$453
Total	$117	$126	$156	$164	$176

Source: Special ITS U.S. Tabulations, MTCR, S3, R13.

CHART 25: Total U.S. Expenditures by Region

	1994		1996		1998		1999		2000		2000/94
Regions	Millions	Share	Millions	Share	Millions	Share	Millions	Share	Millions	Share	% Rate of Change in Shares
1	$525	19%	$731	22%	$1,074	23%	$1,103	22%	$1,089	21%	9%
2	$477	17%	$547	17%	$1,005	21%	$926	19%	$926	18%	3%
3	$42	2%	$47	1%	$91	2%	$105	2%	$111	2%	40%
4	$1,058	39%	$1,288	39%	$1,586	34%	$1,782	36%	$1,922	38%	-2%
5	$85	3%	$86	3%	$98	2%	$105	2%	$123	2%	-32%
6	$219	8%	$285	9%	$294	6%	$368	8%	$400	8%	-6%
7	$45	2%	$24	1%	$29	1%	$27	1%	$26	1%	-69%
8	$30	1%	$25	1%	$49	1%	$48	1%	$47	1%	-9%
9	$84	3%	$76	2%	$162	3%	$128	3%	$132	3%	-16%
10	$11	*	$18	1%	$17	*	$13	*	$23	1%	0%
11	$44	2%	$47	1%	$68	1%	$61	1%	$71	1%	-25%
12	$119	4%	$142	4%	$240	5%	$253	5%	$250	5%	19%
Region Unknown	$2	0%	$2	0%	$0	0%	$3	0%	$3	*	0%

Source: Special ITS U.S. Tabulations, MTCR, S13. *Less than 0.5%.

GLOSSARY

ACCOMMODATION TYPE refers to the type(s) of accommodation used on the trip.

Commercial accommodation: hotel, motel, camping/trailer park and commercial cottage

Non-Commercial accommodation: home of friends or relatives, private cottage.

Other: Few categories of accommodation are available in the ITS questionnaire and no instructions are provided to guide the respondent in the use of "other" accommodation. As such, "other" could include B&Bs, resorts, dormitories, hostels, sleeping berths on trains and boats, etc.

Commercial Unspecified: This term is used when a respondent did not specify the type of accommodation used, but indicated that he/she spent money on accommodation.

Any commercial accommodation: Refers to trips on which a respondent reported utilising any form of commercial accommodation.

Any non-commercial accommodation: This term is analogous to *any commercial accommodation*, and is used for trips reporting staying with friends and relatives and/or in private cottage or vacation home.

ACTIVITIES ON TRIP. Respondents were asked to indicate whether they participated in any of the pre-specified activities. The activity could have occurred at any location on the trip since the activity data are not captured on a location-specific basis.

Since a visitor could participate in more than one activity, the activity shares add up to more than 100%.

EXPENDITURES ON TRIP. These include all dollars spent by all persons on a travelling party. These expenditures exclude transportation fares paid to non-Canadian carriers.

MODE OF TRANSPORT. The ITS records two types of transport used: a) to enter Canada and b) while in Canada. *Other* transport includes pedestrian, motorcycle and bicycle. Due to multiple responses on the mode of transport while in Canada (i.e. a respondent could have used multiple transportation modes), the numbers of the various modes used add up to more than 100%.

PERSON NIGHT. One visitor spending one night in a specified location on the trip.

PERSON VISIT. A person making one visit to a region.

PURPOSE OF TRIP (MAIN). The main reason for the trip to Canada. The details for each main group are as follows:

Pleasure: includes vacation, visiting second home, attend events/attractions and shopping.
Business: includes attending a meeting, convention, and other work.
Visiting Friends and Relatives: includes visiting friends and relatives.
Other: includes personal, in transit, and other.

MAP OF ONTARIO'S TRAVEL REGIONS

ENDNOTES

[1] Source: Special ITS U.S. Tabulations, MTCR, pages P29-1, M55-1.
[2] Source: Special ITS U.S. Tabulations, MTCR, page S-3, P31, P32.
[3] Source: Special ITS U.S. Tabulations, MTCR, page P39-1.
[4] Source: Special ITS U.S. Tabulations, MTCR, page P18/19-1.
[5] Source: Special ITS U.S. Tabulations, MTCR, page P7-1.
[6] Source : Calculs spéciaux, enquête sur les voyages internationaux, États-Unis, MTCL, pages P29-1, M55-1.
[7] Source : Calculs spéciaux, enquête sur les voyages internationaux, États-Unis, MTCL, pages S-3, P31, P32.
[8] Source : Calculs spéciaux, enquête sur les voyages internationaux, États-Unis, MTCL, page P39-1.
[9] Source : Calculs spéciaux, enquête sur les voyages internationaux, États-Unis, MTCL, pages P18/19-1.
[10] Source: Special ITS U.S. Tabulations, MTCR, page M53-1, M54-1.
[11] Source: Special ITS U.S. Tabulations, MTCR, page S1-1.
[12] Not all of the U.S. visitors who entered Canada through Ontario ports visited the province.
[13] See Statistics Canada border crossing statistics, 2000.
[14] Source: Special ITS U.S. Tabulations, MTCR, page P39-1.
[15] Source: Special ITS U.S. Tabulations, MTCR, page P1-1, P2-1.
[16] Source: Special ITS U.S. Tabulations, MTCR, page P2-1.
[17] Source: Special ITS U.S. Tabulations, MTCR, page M51-1.
[18] Source: Special ITS U.S. Tabulations, MTCR, page P18/19-1.
[19] Source: Special ITS U.S. Tabulations, MTCR, page P19-1.
[20] Source: Special ITS U.S. Tabulations, MTCR, page P7-1.
[21] Source: Special ITS U.S. Tabulations, MTCR, page P-35-1.
[22] Source: Special ITS U.S. Tabulations, MTCR, page P49-2.
[23] Source: Special ITS U.S. Tabulations, MTCR, page P50-1.
[24] Source: Special ITS U.S. Tabulations, MTCR, page M40-1.
[25] Source: Special ITS U.S. Tabulations, MTCR, page P16-1.
[26] Source: Special ITS U.S. Tabulations, MTCR, page R2; M37-1/4.
[27] Source: Special ITS U.S. Tabulations, MTCR, page P42-1.
[28] Source: Special ITS U.S. Tabulations, MTCR, pages P29-1, M55-1.
[29] Source: Special ITS U.S. Tabulations, MTCR, page R4.
[30] Carrier fares are assigned to ports of entry/exit within the ITS. If a visitor entered/exited Canada in a province other than Ontario, only a portion or none of their domestic carrier fares would be attributed to Ontario.
[31] Pleasure travel within the U.S. market segment represents 50% of all trips and spending by these visitors represents 49% of the total spent in the province in 2000 (excluding carrier fares). Business U.S. travel represents less than one-tenth (8%) of all U.S. travel and just under one-quarter of all spending in Ontario (23%). Excludes domestic carrier fares to/from Canada.
[32] Source: Special ITS U.S. Tabulations, MTCR, page P-35.
[33] Source: Special ITS U.S. Tabulations, MTCR, page P14-1.
[34] Source: Special ITS U.S. Tabulations, MTCR, page P14-1.